

CALIFORNIA STATE TREASURER'S OFFICE

POSITION DUTY STATEMENT

☐ PROPOSED

☒ CURRENT

DIVISION OR BCA ScholarShare Investment Board (SIB)					POSITION NUMBER (Agency-Unit-Class-Serial) 302-001-4801-001	Position ID 7502
UNIT Marketing and Outreach					CLASSIFICATION TITLE Staff Services Manager II (Supervisory)	
TIME BASE / TENURE Full Time/Permanent	CBID S01	WWG E	COI Yes ☒ No ☐	MCR 2	WORKING TITLE	
LOCATION Sacramento					INCUMBENT	EFFECTIVE DATE
STATE TREASURER'S OFFICE MISSION						
The State Treasurer's Office (STO) provides banking services for state government with goals to minimize banking costs and maximize yield on investments. The Treasurer is responsible for the custody of all monies and securities belonging to or held in trust by the state; investment of temporarily idle state and local government monies; administration of the sale of state bonds, their redemption and interest payments; and payment of warrants drawn by the State Controller and other state agencies.						
DIVISION OR BCA OVERVIEW						
BRIEFLY DESCRIBE THE DIVISION/UNIT FUNCTIONS The ScholarShare Investment Board sets investment policies and oversees all activities of ScholarShare 529, the state's 529 college investment plan. The program enables Californians to save for college by putting money in tax-advantaged investments. After-tax contributions allow earnings to grow tax-deferred, and disbursements, when used for tuition and other qualified expenses, are federal and state tax-free.						
GENERAL STATEMENT						
BRIEFLY (1 OR 2 sentences) DESCRIBE THE POSITION'S ORGANIZATIONAL SETTING AND MAJOR FUNCTIONS Under the general direction of the Staff Services Manager III (SSM III/Deputy Executive Director), the Staff Services Manager II (Supervisory) (SSMII) is responsible for overseeing all aspects of marketing and outreach for ScholarShare Investment Board (SIB's) programs. This includes developing the strategic partnerships and marketing development of the programs, oversee subordinate Staff Services Manager I (SSMI), and represent the agency with internal and external stakeholders. The SSMII is a member of the management team with decision making authority as approved by the Executive Director and Deputy Executive Director.						
% of time performing duties	Indicate the duties and responsibilities assigned to the position and the percentage of time spent on each. Group related tasks under the same percentage with the highest percentage first.					
50%	Marketing, Outreach Management, Public Relations Oversight: Provides oversight of SIB's marketing, communications, and outreach operations by directing managers responsible for day-to-day program implementation. Establishes strategic priorities for statewide marketing campaigns, outreach initiatives, media relations, and public engagement efforts. Oversee the planning, design, production, and deployment of all marketing and outreach content, including digital media, print collateral, social media communications, videos, toolkits, informational materials, and special campaigns that support public education and stakeholder engagement. Ensures consistent brand identity and messaging across programs, including logo use, naming conventions, and compliance with accessibility and communication standards, reflecting SIB's mission and values. Collaborates with the STO's External Affairs Office, the SIB Plan Manager, Information Technology, administrative units, public relations firms, and other contracted vendors to plan and execute marketing strategies. Serves as SIB's senior advisor and brand ambassador, ensuring all initiatives align with strategic priorities, agency goals, and program objectives. Advises and provides direction on content development and approval processes for media and public-facing materials to enhance SIB's public profile. Represents SIB at in state and out-of-state conferences, meetings, and events to promote program awareness, strengthen stakeholder relationships, and advance agency objectives.					
25%	Data Management, Research, and Reporting: Plan and direct managers responsible for unit operations on the reporting, research, and data functions for programs. Oversee the development and submission of statutorily required reports, board materials, surveys, and stakeholder updates. Ensures accuracy and timeliness of responses to information requests from the STO, Administration, and Legislature. Ensure that data insights extracted from the California Department of Education (CDE) DataQuest platform and other data sources are incorporated into marketing and outreach strategies, making efforts equitable, data-driven, and results-					

	oriented. Advises executive management with analytical reports and provides recommendations on program and policy decisions.	
20%	Partnerships and Stakeholder Engagement: Advises on and coordinates reporting efforts to ensure all marketing, outreach, and operational initiatives align with SIB's strategic plan and agency goals. Leads partnership and stakeholder engagement activities, including collaboration with other STO programs, educational institutions, community organizations, and financial partners. Oversee development of strategic campaigns, translation and accessibility efforts, and cross-agency communication initiatives. Strengthens and maintains relationships with key stakeholders to support program innovation, participant engagement, and statewide visibility. Provides coaching and feedback for subordinate SSM I, including evaluations, probationary reports, and corrective actions as appropriate.	
5%	Conduct various other duties for the support and daily operation of the Board.	
SPECIAL REQUIREMENTS		
N/A		
To be reviewed and signed by the supervisor and employee:		
EMPLOYEE'S STATEMENT:		
I HAVE DISCUSSED THE DUTIES AND RESPONSIBILITIES OF THE POSITION WITH MY SUPERVISOR AND RECEIVED A COPY OF THIS DUTY STATEMENT.		
EMPLOYEE'S NAME (Print)	EMPLOYEE'S SIGNATURE	DATE
SUPERVISOR'S STATEMENT:		
- I CERTIFY THIS DUTY STATEMENT REFLECTS CURRENT AND AN ACCURATE DESCRIPTION OF THE ESSENTIAL FUNCTIONS OF THIS POSITION - I HAVE DISCUSSED THE DUTIES AND RESPONSIBILITIES OF THE POSITION WITH THE EMPLOYEE AND PROVIDED THE EMPLOYEE A COPY OF THIS DUTY STATEMENT.		
SUPERVISOR'S NAME (Print)	SUPERVISOR'S SIGNATURE	DATE